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Version 14.0

Installation Guide and User's Manual

HOTdocs™
Version 2010



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ALL-STATE LEGAL Forms Software (ASLF) contains over 300 forms in the following practice areas: Real Estate, Family Law, Business Law, Litigation, Estate Law and Workers' Compensation. It now includes NJ Corporate Minutes with tax forms. Using ASLF is easy. Simply select the form you need for a specific case and enter your answers in the preprogrammed text boxes. When that form is complete, you save your answers in an "answer file" and use them to complete any other forms. All repetitive information will be inserted automatically into the new form. You enter the data once and ASLF does the rest!

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Minimum System Requirements

The current runtime/player version of HotDocs will install when you install ASLF. To ensure the best performance, it is important to meet the minimum requirements listed below. HotDocs is a 32-bit application and will not work in DOS, Windows 3.1 or most instances of Windows 95 operating systems but is compatible with 64 bit systems.

- IBM-compatible PC (Not compatible with MAC or iMac)
- 900 MHz or higher processor (2 GHz recommended)
- 1 GB RAM (2 GB RAM, recommended)
- 50 MB hard disk storage
- Microsoft Windows XP SP3, Windows Vista or Windows 7
(**No longer compatible with Windows 2000, 98 SE, ME, NT.**)
- Adobe Reader 6 or higher
- Microsoft Internet Explorer 6.0 or later with an **OPEN Internet connection**
- Microsoft Word 2000 or higher or Corel WordPerfect 8 or higher
- CD-ROM Drive
- Laser Printer (for printing graphical forms) with 2-1/2 MB of memory. Other types of **printers** may or may not print as expected. They include:
 - Ink Jet, Desk Jet or Bubble Jet printers
 - Brother printers²
 - All-in-one printers
 - 16-bit postscript printer drivers
 - Xerox printers
 - Most USB Host-based printers (Note: A host-based printer depends on the computer's processor to generate printable pages, rather than the printer's processor.)

TIP: For the most reliable results, use a PCL-based printer with at least 8 MB RAM. Additionally, it is recommended that you print within the 300 dpi to 600 dpi range, as printing at higher resolutions may be problematic.

² When using a Brother printer, you can expect a General Protection Fault. Brother is aware of the problem. The only workaround is to use the suggested emulation (compatible) printer listed in the printer documentation.

Patch/Update Installations

Legal forms change frequently and during the first year of purchase or acceptance into the subscription service, you will receive updates to the software. Each time you start HotDocs Player, it automatically checks for updates to ASLF, provided you have an **OPEN** Internet connection. If any updates are available, you will see a flashing **update** icon in the status bar (lower right-hand corner of the HotDocs library window).

Update template sets automatically

- 1) Double-click the **update icon** (blinking yellow triangle located in the bottom right hand corner on the status bar). The **Install Template Set Updates** dialog box appears, displaying a list of updates.
- 2) Select **Install** for each update item you would like to download and install.
- 3) Select **Discard** for each update item you do not wish to install. HotDocs will not prompt you to install discarded updates again.
- 4) Click **Continue**. HotDocs installs the selected update items. If prompted, select **Overwrite All** to replace old files with the updated files.
- 5) A confirmation dialog appears indicating that the update(s) have been installed.

TIP: The first time you run HotDocs Player, your firewall software may warn you that HotDocs is about to access the Internet. You should grant HotDocs permission to access the Internet in order for the automatic template set update feature to work.

TIP: You can also check for updates manually at any time by selecting Tools > Update Template Sets.

If you prefer not to use the automatic template set update feature, LexisNexis provides updates to ASLF through HotDocs auto-install (.HDI) files posted on the Internet. Follow these steps to update your forms and template library.

Update template sets manually

- 1) In your Internet browser, go to
http://support.lexisnexis.com/autoforms/record.asp?ArticleID=autoforms_nj_aslf.
- 2) Click the desired update file. HotDocs installs the templates and automatically opens the updated library.

Full version updates automatically ship on CD free of charge, whereas patch updates are downloaded from the website with notification sent either by email or fax. When you receive these notifications you should update your software as soon as possible. Charges apply when requesting another full version or patch updates on CD.

Installation

The ASLF software will help you quickly generate practical documents for your practice. The CD includes the forms library and the latest version of HotDocs Player and is a two-step installation process. It is recommended that you install the version of HotDocs Player that is on the CD and should accept the standard settings, unless your system administrator tells you to make specific changes to these settings. If your CD-ROM drive has the auto-run feature enabled, the CD browser window will appear automatically when you insert the CD into the CD-ROM drive.

In preparation and to avoid potential problems, close any open applications, especially any word processing program or existing versions of HotDocs and disable your anti-virus software. If you have the ASLF Demo installed on your computer it is advised to uninstall it before installing the full version. These items can be uninstalled within Windows' Control Panel by choosing the Add/Remove Programs option.

Install HotDocs Player

If HotDocs Player is not already installed on your workstation, you will need to install it before installing the Forms Set. Installing HotDocs Player does not affect the operation of an earlier version of HotDocs. Both versions can be installed on the same computer simultaneously.

- 1) Insert your ASLF software CD into your CD-ROM drive. The ALL-STATE LEGAL Forms menu appears.
- 2) Click **Install**. The Install menu appears.
- 3) Click **Install HotDocs Player**. The installation program starts.
- 4) Follow the on-screen prompts. Click the **Next** button to move to each screen and click **Finish** to complete the installation.

When installing to an individual computer choose "Typical." By default, the software is installed to the C:\Program Files\HotDocs 6 directory on your hard drive.

TIP: If the ALL-STATE LEGAL Forms Menu does not appear, to manually install Player, select RUN from the START menu and type **D:\player\setup.exe** or **D:\autorun** (where D:\ is your CD-ROM drive). Follow the on-screen prompts to complete the installation.

Install ASLF Forms Set

After HotDocs Player has been installed on your workstation, you are ready to install the Automated Forms Set.

- 1) Insert your ASLF software CD into your CD-ROM drive. The ALL-STATE LEGAL Forms menu appears.
- 2) Click **Install**. The **Install** menu appears.
- 3) Click **Install Automated Forms**. The installation program starts.
- 4) Follow the on-screen prompts, click the **Next** button to move to each screen and complete the installation.

TIP: To manually install the Forms Set, select RUN from the START menu and type **D:\setup.exe** or **D:\autorun** (where D:\ is your CD-ROM drive). Follow the on-screen prompts to complete the installation.

Network Installations

If you purchased a multi-user license agreement, you can install ASLF on your network and run HotDocs Player on multiple workstations. The multiple workstation setup differs from the standard setup by placing the template and library files on a network drive shared by all users instead of on local workstations. The network installation utility is found on the installation CD in the NS directory. Also, the network administrator performs all updates instead of the individual users.

There are four parts to installing ASLF on multiple workstations:

- Set up the network drive that will store the Forms Set files.
- Deploy the forms and workstation installation files to a folder on the network.
- Customize the workstation install as desired.
- Run the workstation installation program on each workstation. This program first installs HotDocs Player if it is not already installed on the workstation. Then it runs the Automated Forms workstation setup program, which create shortcuts to the library on the network and configures HotDocs to access the Forms Set on the network.

TIP: If you are installing a new release of a forms set you have previously installed on the network, you should use the same settings and file locations as the original installation. This ensures that users can continue accessing the forms as before without additional changes to individual workstations. However, if the new forms set includes an updated version of HotDocs Player, the new Player should be installed on each workstation.

Part 1: Set up the network for the forms set install

- 1) Identify a network drive accessible to all users who will use the forms set.
- 2) Ensure the target drive has sufficient space to store the forms set with its supporting workstation installation files. The space required varies depending on the forms set, but it is usually 50–70 MB. The network install will check for sufficient space before it copies files to the network.
- 3) Optionally, create a folder on the network drive where you want to store the forms set files. The network install will create a folder if one does not exist, but you may want to create a folder on the network drive to hold all of your LexisNexis Automated Forms sets.
- 4) Optionally, create a folder for answer files.
- 5) Set file system rights to the network folders. Generally, users accessing the forms on a network should have read-only access to prevent them from deleting or changing the files. The exceptions to this rule are the answer file and upload answer file folders that do require users to have write access. Network administrators should have full access to the network folders.

Part 2: Deploy the forms and workstation installation files to the network

- 1) Insert the forms set CD into your CD-ROM drive.
- 2) Click the **Start** button on the Windows taskbar and then select **Run**. The **Run** dialog box appears.
- 3) Type **D:\ns\deploy.cmd** (where *D:* is your CD-ROM drive) then click **OK**. . The installation program starts. Follow the on-screen prompts to complete the deployment.

- 4) When prompted for the **Network location**, specify the network location where the forms set and workstation setup program will be located. (This location must be different for each forms set you deploy to the network. You may use the same main folder, but each forms set must be deployed to a separate subfolder.)
- 5) At the **Customizing the Workstation Installs** dialog box, note the location of the workstation command (batch) file, *workstation.cmd* and then click **Install**.

TIP: Deploying the forms and workstation installation files to the network does not actually *install* software in the sense of adding it to Windows' *Add or Remove Programs* list. Instead, it simply copies files to the network and configures them for easy distribution to individual workstations. If you wish to remove the files from the network, simply delete the contents of the network folder. Likewise, if the network location contains files from a previous install, you should delete the old contents before deploying the new files.

Part 3: Customize the workstation install

- 1) Browse to the location of the workstation command file (*workstation.cmd*) as noted in step 5 above.
- 2) Edit **workstation.cmd** (right-click and choose **Edit** from the shortcut menu). The file is opened in Notepad.

TIP: The workstation command file allows network administrators to install HotDocs Player and Automated Forms on multiple workstations without manually changing the settings each time. It contains a number of `msiexec` commands, most of which should be commented out with the `REM` command.

- 3) Add or remove `REM` commands in the file so that commands with the desired arguments are activated. The following table describes the available commands:

To	Do This
Install HotDocs or the Automated Forms template set silently	<p>Use the /qn command-line option. For example:</p> <pre>msiexec /i "HotDocs Player Edition.msi" /qn msiexec /i "LexisNexis Automated Forms.msi" /qn</pre> <p>When this option is used, the install is completed without user intervention and without any visible indication of the installation process. The user will not be prompted for file locations or otherwise be able to customize or cancel the installation.</p>
Specify a folder for HotDocs program files other than the default location	<p>Use the INSTALLDIR property when installing HotDocs Player. For example:</p> <pre>msiexec /i "HotDocs Player Edition.msi" INSTALLDIR="C:\HotDocs Player\"</pre> <p>This command would install HotDocs Player to C:\HotDocs Player\ rather than the default (C:\ProgramFiles\HotDocs 6\).</p>
Specify a folder for HotDocs answer files other than the default location	<p>Use the FOLDER_ANSWERS property when installing HotDocs Player. For example:</p> <pre>msiexec /i "HotDocs Player Edition.msi" FOLDER_ANSWERS="K:\Answers\"</pre> <p>This command would set up HotDocs to use K:\Answers\ as the default answer file folder.</p>

Enable automatic update notifications	<p>Use the INSTALL_HCAT property when installing the forms set. For example:</p> <pre>msiexec /i "LexisNexis Automated Forms.msi" INSTALL_HCAT=yes</pre> <p>In a network setup environment, one user is typically designated as the forms set administrator. Automatic update notifications should be enabled for that user, but not for the rest of the users. In that way, only one user will see the update notifications and apply the updates, but all users will see the updated templates when the administrator applies the updates.</p>
Create an installation log file	<p>Use the /L*v command-line option. For example:</p> <pre>msiexec /i "HotDocs Player Edition.msi" /L*v C:\player.log msiexec /i "LexisNexis Automated Forms.msi" /L*v C:\templateset.log</pre> <p>This option causes the install to create a log file with details about which files were installed and whether the install succeeded or not. Log files are useful for troubleshooting errors that may occur during the installation.</p>

- 4) Save your changes to **workstation.cmd** and close Notepad.

TIP: If HotDocs was installed previously, this will not replace a user's existing answer file folder preference. In that case, HotDocs will continue to use the answer file folder previously specified by the user. See "Change HotDocs Program File Locations" in the HotDocs Helps for information about manually changing the answer file folder.

Part 4: Run the workstation installation program on each workstation

- 1) At each workstation, click the **Start** button on the Windows taskbar and then select **Run**. The **Run** dialog box appears.
- 2) In the **Open** box, specify the path to the workstation command file (for example, *H:\workstation.cmd*).
- 3) Click **OK**.
- 4) Follow the on-screen prompts to complete the installation. It will install HotDocs Player (if not already installed on the workstation), create shortcuts to the library on the network and configure HotDocs to access the forms set on the network.

TIP: This batch file does not work if you run it from a UNC path. Map the network drive as needed to avoid this error.

Additional information on installing ASLF to a network can be found at:

<http://forum.hotdocs.com>

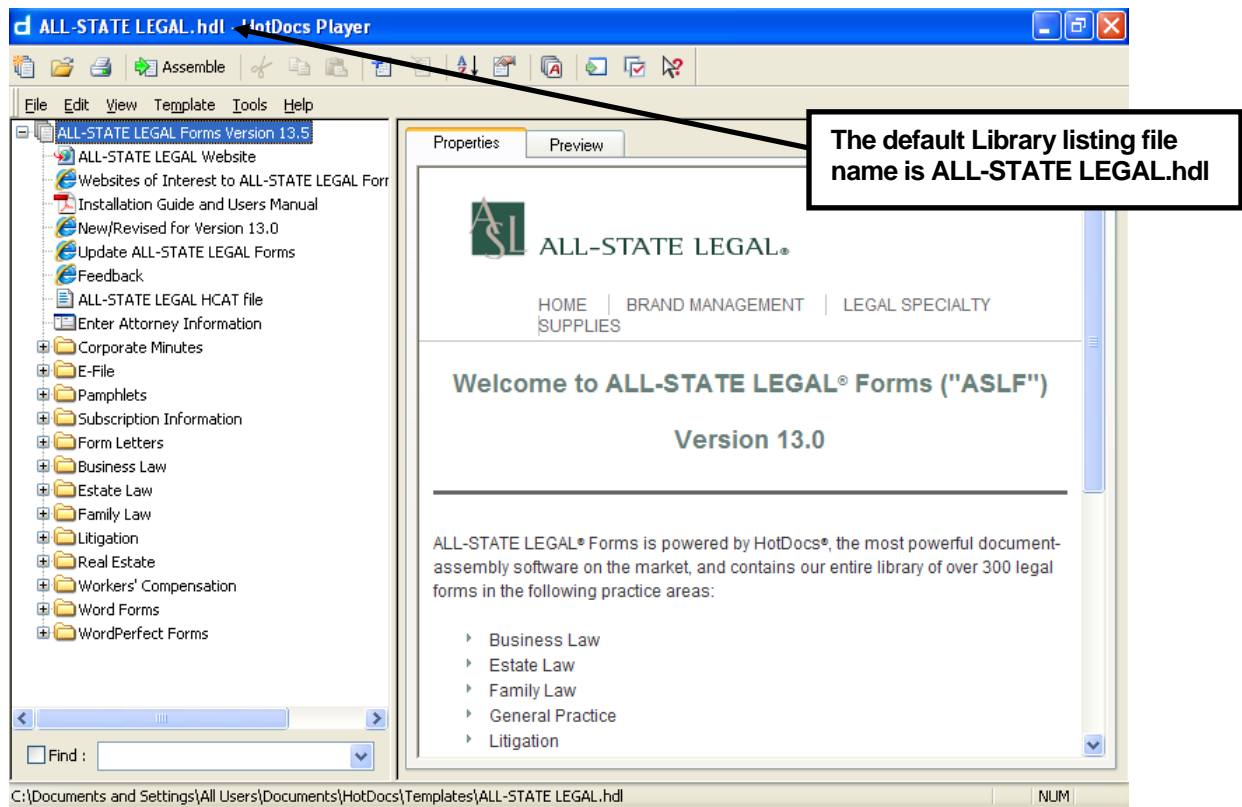
or

Call the Technical Support Hotline at 800-223-5297

Getting Started

Once ASLF is installed, you can use the forms templates to assemble documents. To access the templates (legal forms), you will use the ASLF template library. This template library helps you organize various Legal Forms, including practice specific forms, word-processing forms and Corporate Minutes.

When you start the ALL-STATE LEGAL Forms software, the first thing that appears is the **library listing** of available forms.



TIP: To learn more about the HotDocs library window and using template libraries, see the HotDocs Helps. To access the HotDocs Helps, select HotDocs Help from the Help menu or press F1.

The template library window is divided into two panes. The left pane lists the items referenced in the library. The right pane displays information about a selected item, including a description, such as a note explaining the revision date of that specific legal form.

The library consists of folders pertaining to the practice areas of Business Law, Estate Law, Family Law, Litigation, Real Estate and Workers' Compensation. Each list contains form documents for use with Corel WordPerfect or Microsoft Word, a wizard that allows you to input default information about your law firm and shortcuts to ALL-STATE LEGAL and LexisNexis® web pages for easy accessibility to updates.

TIP: Items in the library work like shortcuts to the actual files, so you must be careful when working with the actual files. Moving an actual file without updating the file path will make the file inaccessible from the library.

Different Types of Templates

The ASLF Library contain several types of templates, each designed to help you assemble documents.

INTERVIEW TEMPLATES

An interview template does not assemble a document. This kind of template gathers and saves information in a HotDocs answer source. Providing answers for an interview template is also called completing an intake interview. The answers from the intake interview can then be used in assembling other documents. For example, a template library might include an interview template named *Client Information*. This template could gather general information about each client— such as a name, address, gender, date of birth and so forth. You could assemble this interview template first and create a set of answers in the answer source. Then, when you assemble other documents that ask for client information, the answers are available for you to select.

TEXT TEMPLATES

A text template is created and automated in a word processor, such as Microsoft Word or Corel WordPerfect. After you assemble a document using a text template, you can view the document in your word processor and edit any section of the text.

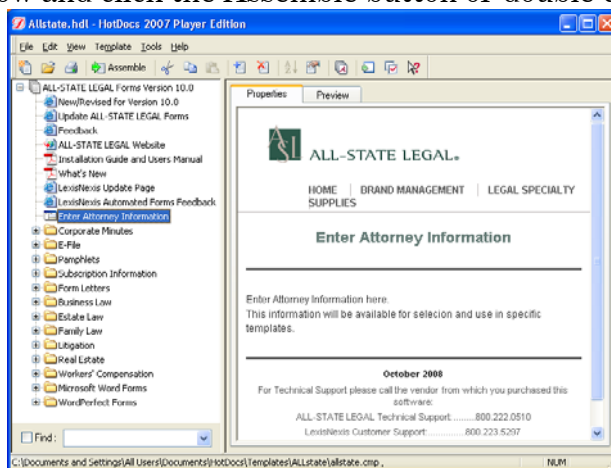
FORM TEMPLATES

A form template is a static form or one in which the underlying text cannot be changed or modified. You can provide answers for these graphic-based documents by answering a series of dialogs or by using direct-fill assembly to type answers directly on the form. In form templates, though, answers are limited to a specific area on the page, which may not provide enough space for the answer. Answers that overflow can be sent to an addendum.

Entering the Attorney Information

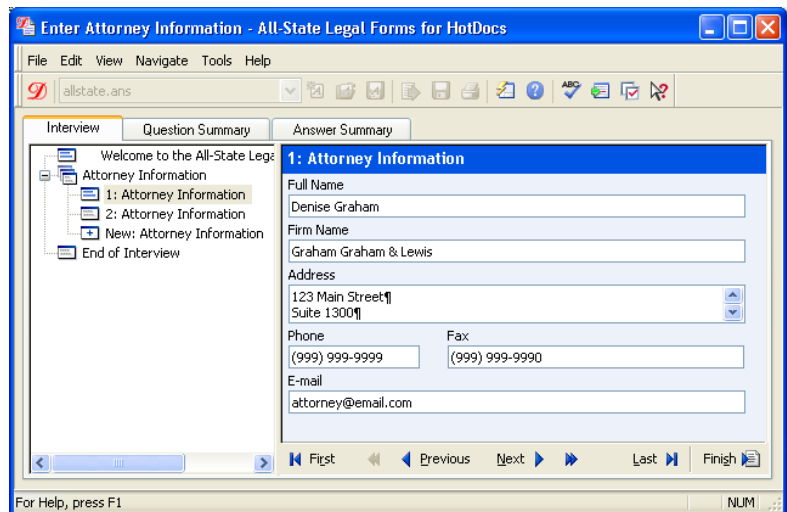
To make it easier to complete the form templates, ASLF has an interview feature to help you enter the Attorney Information you will want to include on a legal form. This information will be saved to the same directory as your Answer Files (as the **allstate.ans**). If you delete it you will delete the Attorney Information you created. This file should not be deleted from your Answer File Library.

To start the Attorney Information wizard, highlight the Enter Attorney Information item in the library-listing window and click the Assemble button or double click the item.



After reading the Welcome dialog box, click the NEXT button. The interview will begin and you can fill in the Attorney Information.

After you complete the first attorney name, you can click the NEXT button to fill in the second Attorney name and information. Continue until you have completed all of the information you need and then click the FINISH button to “Finish the Entire Interview.” Attorney Information is now saved and will be available to you when you complete each form.



TIP: If you assemble legal forms for more than one attorney, the first Attorney Information should be generic and the subsequent Attorney Information be specific for each attorney.

TIP: You may change the Attorney Information at any time by running the Enter Attorney Information interview again from the library window.

Creating a Default Answer File

When certain answers are used frequently in a specific document, you can have those answers automatically inserted each time you assemble the document. To do this, create a default answer file for that document.

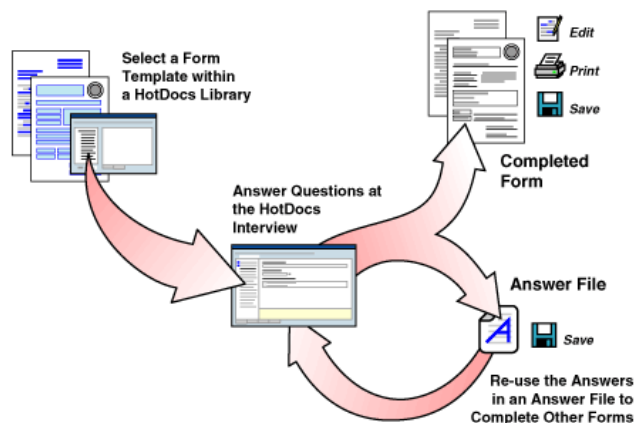
A default answer file must be located in the same folder as the template's component file. It must also have the exact same file name as the component file, but the file extension must be specified as .ANS. In most cases, the file name and path for the component file are identical to the file name and path for the template file. You can usually find this information on the PROPERTIES tab of the HotDocs library window.

TO CREATE A DEFAULT ANSWER FILE:

- 1) At the HotDocs library window, select a template and begin assembling the document, using an untitled answer file.
- 2) Type information only for the answers you want to be default answers.
- 3) Click the **Save Answer** button. The SAVE ANSWER FILE dialog box appears.
- 4) At the FILE NAME box, click the **Browse** button and locate the folder that contains the component file, then type the same file name, followed by the answer file extension (either .ANS or .ANX).
- 5) In the TITLE box, type a name for the default answer file.
- 6) Optionally, in the DESCRIPTION box, type a description for the answer file.

The next time you assemble the document, HotDocs automatically inserts the answers from the default answer file into the template's answer fields. You can then modify the answers as necessary and save as a new answer file.

Filling a Form

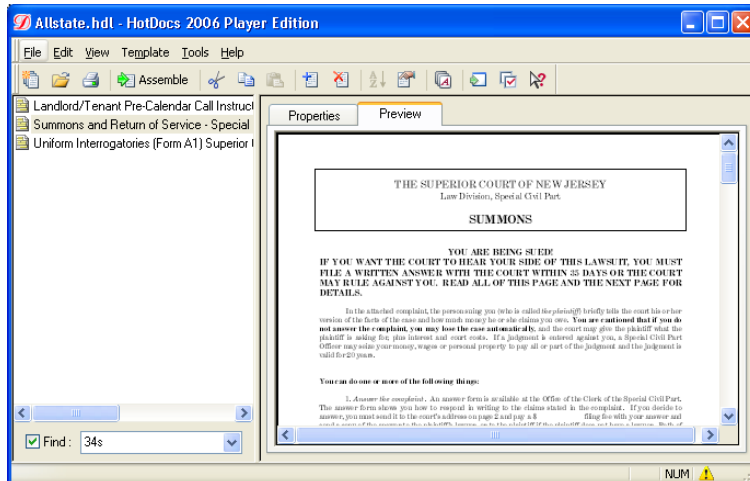


You begin the process by selecting the form you wish to fill from the library listing. You can scroll through the folders to select the form or you can use the **Find feature** to quickly find a form.

If you know the form number (located in the footer of most forms) you can enter that in the Find search criteria box. If the number is unique, that form will appear by itself in the window. If it is only part of a form number, it will list all the forms meeting the criteria. For example, typing in number 34S will result in forms 34S, 434S and 1434s displaying in the window.

You can also type in a word or words found in the title or description of a form to narrow down the list. For example, if you type in Deed the list will be narrowed down to all forms with the word Deed in the title.

After you find the form, highlight it in the list and then click the Assemble button, a second window will open, the Answer File dialog box.



TIP: After assembling a form, you can save the document as an .HPD or .PDF file. When a form document is saved, it is separated from the template file, component file and answer file that created it. This separation means the fields on the document no longer function as HotDocs variables, but simply as text placeholders.

Moving Around a Form

The easiest way to move from text box to text box or field to field, is to use your **Tab key**. To reverse your direction, hold down the Shift key when you hit the Tab key.

To quickly move to the beginning of the document, hold down the Control key and then press the Home key. You can also use your mouse to click in any field.

Answer File

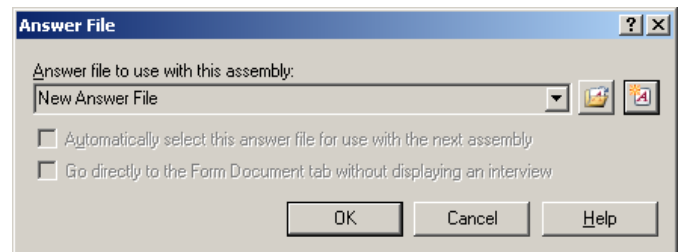
ASLF next requests that you choose an Answer File. You can start a New Answer File or open an existing Answer File.

The Answer File is the information you provide when filling in a form. You may want to create a separate Answer File for each client or case. Saving the information to an Answer File saves time and improves accuracy. Working with Answer Files is the power behind using ASLF. Each form's **text box** is assigned a **variable** name. Text boxes with the same variable name, such as "Client Name," will allow the information from one text box to flow to another within the form. When the same Answer File is used to open a new form, all text boxes with like variable names will also flow.

This example uses a New Answer File.

Click the OK button and the Answer File dialog box will disappear revealing the empty form template filling the screen.

If you completed Attorney Information interview, your law firm information will now appear in the form where applicable. When you click your mouse in a text box it becomes bright yellow indicating this is the active field. Other boxes are pale yellow in color by default³.



Using a Wizard

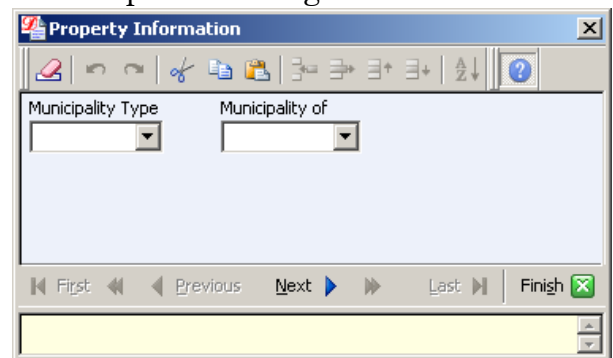
Some of the fields in a form have "wizards." A wizard is a series of dialog boxes that gather the information needed to fill a form. When you click into a field, an icon appears at the end of the box called a Wizard icon. Click on the wizard icon to open the dialog box that contains the additional information.



In this example, click the wizard icon to open the Property Information dialog box that contains the Municipality default information with a drop down box.

Click the arrow of the drop down box to select the municipality needed from the list of default information.

Click your choice and then the FINISH button. You will return to the form and the information will fill in the form.



There are various types of wizards that can be found on the forms like the Date Wizard or the Table Wizard. When you move to a field that has been preprogrammed to



accept a date, a calendar icon will appear. Click the icon and select the date from the calendar to have it automatically enter into the field. The Table icon appears as a spreadsheet icon and displays the table you are completing in a different format. It lists the information you need to enter, such as a list of dependant names and ages.



³ Screen colors can be changed through HotDocs Options. When changing default settings in ASLF, you should document the changes made for future troubleshooting.

Assemble a Document

When you open ASLF the template library window appears where you would select the appropriate word processing template. To verify that you have selected the correct template, you can use the PREVIEW tab to see the general appearance of the document. When you select a word processing template and begin assembling, you start the interview process where you can provide answers, then save and print the completed document. You can also save the answers you provide in an answer file, which allows you to use those answers to quickly assemble other documents.

TO START AN INTERVIEW:






- 1) At the ASLF library window, locate and select a template. The PROPERTIES tab of the library window changes to show the information about the template.
- 2) Click ASSEMBLE. The HotDocs assembly window appears and the ANSWER FILE dialog box appears.
- 3) Select an answer file and then click OK.

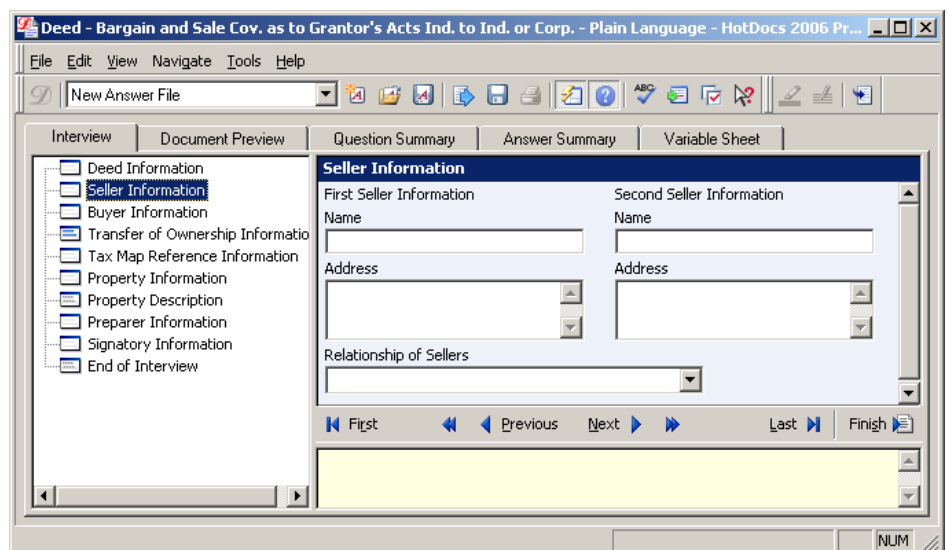
Answers for an Interview

When you assemble a document, the interview appears in the HotDocs assembly window. Most templates include questions that have been arranged into related groups called dialogs. The left pane of the assembly window, the *Interview Outline*, lists the dialogs used in each template. The right pane displays the specific questions used in each dialog.

Providing answers for these questions is the central task of an interview where you can enter all the necessary answers. As you provide answers for each dialog, the icons in the interview outline change to reflect how much of the dialog is complete. Even if you use an existing answer file to provide information for the interview, you may still need to update some answers. You can modify existing answers or enter new information.

TIP: As you provide answers for each dialog, the icons in the interview outline change to reflect how much of the dialog is complete:

-  None of the questions in the dialog are answered
-  At least one of the questions in the dialog is answered
-  All the questions in the dialog are answered
-  Repeats the dialog, allowing you to enter more than one set of answers
-  New, empty repeating dialog where you can add another set of answers to a list

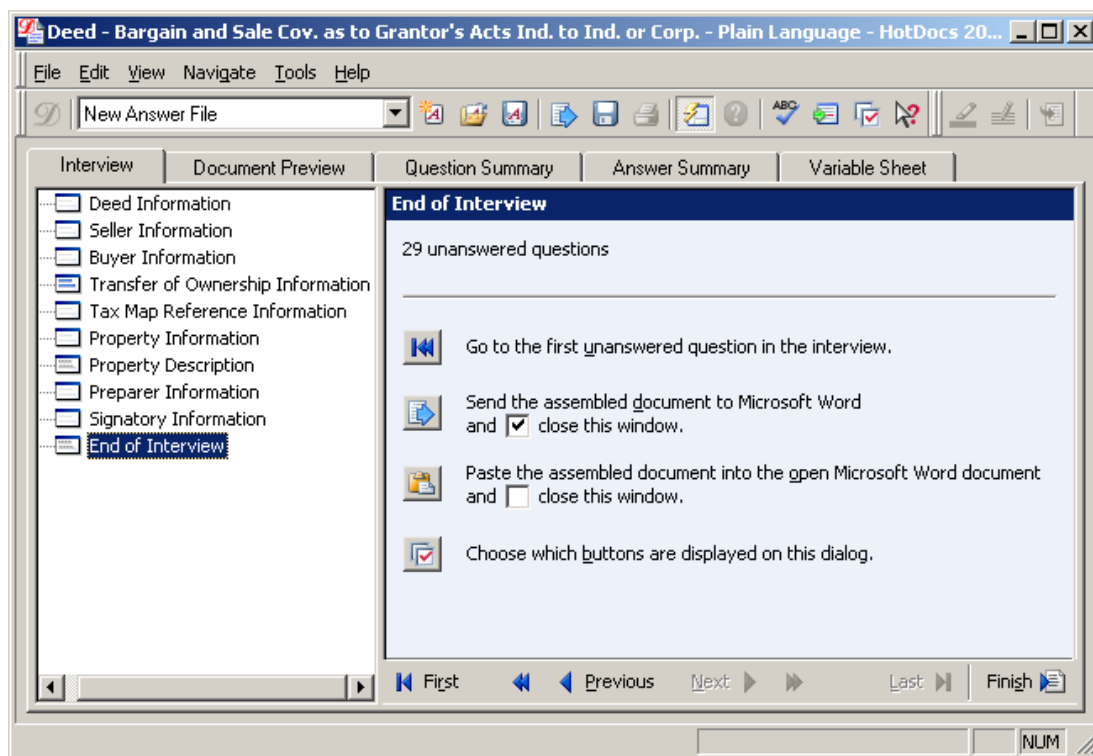


TO ENTER ANSWERS IN AN INTERVIEW:

- 1) At the assembly window, select a dialog from the interview outline. The dialog pane changes to show the questions in that dialog.
- 2) Click in an answer field. That answer field becomes active.
- 3) Enter your answer.
- 4) Move to another field by:
 - Pressing the **Tab** key to move to the next field.
 - Pressing the **Shift+Tab** key to move to the previous field.
 - Clicking on another field in the dialog using your mouse.
- 5) Move to another dialog by:
 - Pressing **Enter**.
 - Pressing the **Page Down** key to move to the next dialog.
 - Pressing the **Page Up** key to move to the previous dialog.
 - Clicking the **Next** button located at the bottom of the navigation panel.
 - Clicking the **Previous** button located at the bottom of the navigation panel.
 - Clicking on another dialog in the interview outline using your mouse.

End of Interview Dialog

The END OF INTERVIEW dialog appears after the last dialog in each interviews. At the top of the dialog, unanswered questions are reported. Below that are buttons for working with your document and check boxes for closing the assembly window.



After some of the buttons in this dialog, there is a check box titled **CLOSE THIS WINDOW**. If you select this check box, HotDocs will automatically close the assembly window prompting you to save either the answer file and the assembled document. Also, HotDocs will remember which check boxes you have selected and will use these settings for future interviews.

After entering the answers, you can print or save the completed document or attach it to an email message. Before doing any of these tasks, you can view the assembled document in the assembly window and make sure the information is accurate.

TIP: You can choose which buttons appear on the END OF INTERVIEW dialog. You make your selections at the HotDocs Options.

TO WORK WITH ASSEMBLED DOCUMENTS AT THE *END OF INTERVIEW* DIALOG

- 1) At the HotDocs library window, select a template and begin assembling the document.
- 2) After completing the interview, the *End of Interview* dialog appears, where you can perform any of the following tasks:

GO TO THE FIRST UNANSWERED QUESTION IN THE INTERVIEW

If you skip questions during the interview, HotDocs will display a message at the *End of Interview* dialog indicating how many questions are unanswered. Normally, you should answer each of these questions before proceeding.

- 1) At the *End of Interview* dialog, click **Go to the first unanswered question in the interview** to return to the place in the interview where the first unanswered question appears.
- 2) Click the **Next Unanswered Dialog** button in the navigation bar to navigate to each subsequent unanswered question in the interview.
- 3) When all questions are answered (as indicated by icons in the interview outline), click the **Next Unanswered Dialog** button to display the *End of Interview* dialog.

VIEW AN ASSEMBLED FORM DOCUMENT

After you complete an interview, you can view the assembled form document at the **Form Document** tab.

- 1) At the *End of Interview* dialog, click **View the assembled form document at the Form Document tab**. The assembly window changes to display the form document.
- 2) Optionally, if you want HotDocs to notify you of any overflowing answer fields when it displays the form document, select **check for answer overflow**.

SEND A TEXT DOCUMENT TO THE WORD PROCESSOR

After you complete an interview, you can view the assembled text document in your word-processor.

- 1) At the *End of Interview* dialog, click **Send the assembled document to the word processor**. The word processor appears, showing the completed document.

TIP: Pressing F11 will also send the document to the word processor.

While you are assembling a document, you can change an answer in one location and that change is applied throughout the document. However, once you save a document, it is separated from HotDocs and no longer functions as an automated form. This means you must manually locate and change each answer that needs to be modified. If you must change answers in an assembled document, it is recommended that you reassemble the document using the original answer file and make your changes during assembly.

PASTE AN ASSEMBLED TEXT DOCUMENT INTO AN EXISTING DOCUMENT

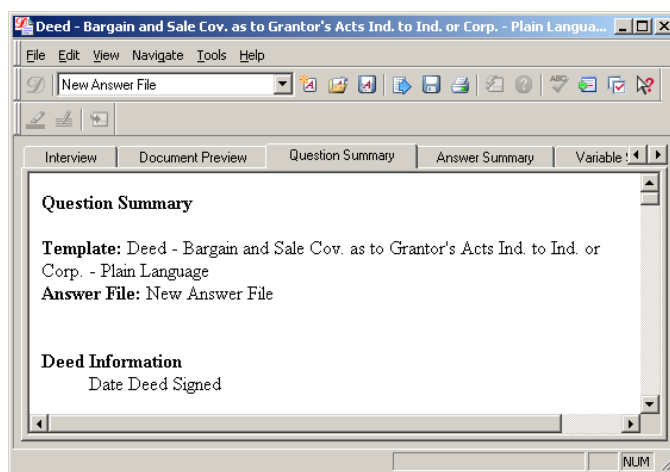
You can paste (insert) an assembled text document into an existing word processor document. For example, if you have an existing contract, you can assemble a document containing additional terms to the contract and paste those new terms into the existing document.

- 1) In your word processor, open the document into which you want to paste the assembled document.
- 2) Place your cursor at the location in the document where you want to paste the assembled document.
- 3) At the *End of Interview* dialog, click **Paste the assembled document into the open word processor document**. The word processor appears, showing the assembled document inserted into the existing document.

View a Summary of Questions or Answers

You can view a brief summary of the question and/or answers that are used in a word processing template. A Question Summary shows an outline of dialogs and questions. You can print Question Summaries to use questionnaires. An Answer Summary presents both the questions and the answers used to assemble a document. This provides a context for the answers without requiring you to read the entire documents and it can be effective format to keep printed copies of your work.

- 1) At the assembly window, click the **Question Summary** or **Answer Summary** tab. The assembly window changes to show the selected summary.



Open a Saved Document

After completing a document and saving it, you can later edit the document in the appropriate application:

- Text documents are saved as word processor files (.DOC, .WPD or .RTF) and to edit these files you will use a word processor.
- Form documents are saved as HotDocs form files (.HPD or .HFD) and to edit these files you will use HotDocs Filler.

TO OPEN A SAVED TEXT DOCUMENT (.DOC, .WPD OR .RTF FORMAT)

- 1) Open your word processor.
- 2) Select **Open** (File menu).
- 3) Browse to the saved document and click **Open**.

TO OPEN A SAVED FORM DOCUMENT (.HPD OR .HFD FORMAT)

- 1) Open HotDocs Filler by selecting **Start > Programs > LexisNexis HotDocs Player > HotDocs Filler**.
- 2) Select **Open** (File menu)
- 3) Browse to the saved document and click **Open**.

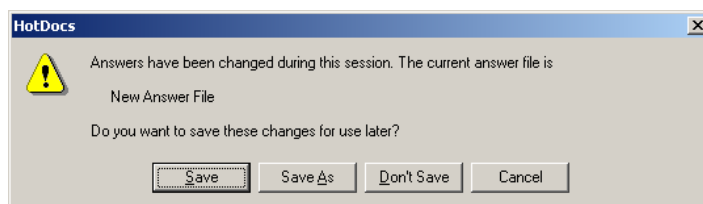
Saving Your Work

ASLF works differently than other software packages you might be familiar with. You will be prompted to save two different types of files. When you complete a form and close, you will be asked to save the Answer File first and then the Assembled document or Filled Form.

IMPORTANT: When you save a Filled Form, the form then becomes a form without programming. The form will no longer spell check or calculate totals, the wizards will not work and you cannot save changes to your Answer File. If you need to make a change to that form, you will need to open a blank form template and bring in the same Answer File you used to create the original Filled Form. No calculations will be updated on a Filled Form. An ANSWER FILE is a compilation of the information you entered while filling a form.

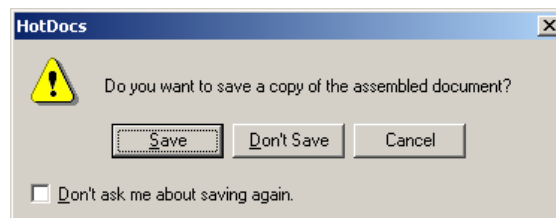
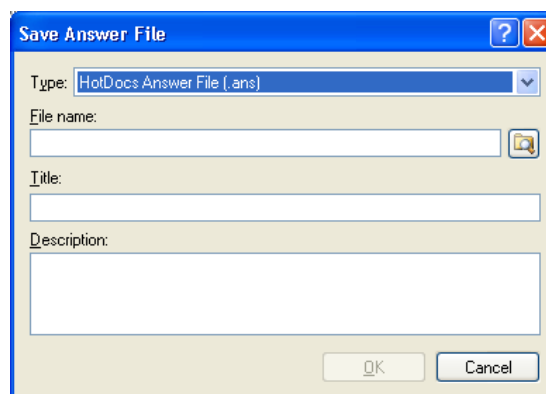
Answer Files

Once a form is completed, it should be saved to an Answer File. When you save the Answer File, you are saving the information you placed in the text boxes on the form. Saving the information into the Answer File allows you to use the data in another form. Saving a Filled Form is only necessary when cosmetic changes are made since they are not saved in the answer file. However, if you want to save the Filled Form, it is best to save it after the form has been finalized, not during the editing process.



TO SAVE AN ANSWER FILE:

- 1) Click on the FILE menu and select CLOSE (or click the "X" in the upper right-hand corner).
- 2) A dialog box appears with "The answers in the answers file FILE NAME have changed. Do you want to save these answers for use later?" Click the SAVE button.
- 3) The Save Answer File dialog box will appear. Fill in the FILE NAME. Use the TAB key to move to the next field; the same information will appear in the TITLE box. You can also type notes into the DESCRIPTION box to view when you next open the Answer File. After completing the information, click the OK button.
- 4) Another dialog appears. "Do you want to save a copy of the assembled document?" Click the DON'T SAVE button.



ASLF then closes the dialog box and the form and returns you to the library-listing screen.

TIP: Answer Files have the .ANS extension whether they are binary or xml answer files.

Saving Filled Forms

After saving the Answer File you then are asked to save the Assembled document or Filled Form. When you save a Filled Form, the form becomes a document without programming. The form will no longer spell check or calculate totals, the wizards will not work and you cannot save changes to your Answer File. You only want to save a Filled Form when cosmetic changes are made since they are not saved in the answer file. However, if you want to save the Filled Form, it is best to save it after the form has been finalized, not during the editing process.

- 1) Click FILE on the menu then select SAVE DOCUMENT AS...
- 2) Enter the filename.
- 3) Select the directory where you would like to save the form.
- 4) Click on the SAVE button.

You will need to open this form again using the HotDocs Filler program. You can access the HotDocs Filler program by going to your program list and selecting HotDocs 6 > HotDocs Filler (assuming the program was installed using the defaults). In HotDocs Filler select FILE, then OPEN to open your saved filled form.

PDF File

By default, when you select a PDF-based (.HPT) template for assembly, you can save the completed document as a PDF file.

- 1) After completing the interview, select SAVE DOCUMENT AS from the FILE menu. The SAVE AS dialog box appears.
- 2) At the SAVE AS drop-down list, select PDF FILE (*.pdf).
- 3) Type a name for the file and browse to the location where it should be saved, then click SAVE. The PDF file is saved at that location.

Working with Saved Filled Forms

After filling a form, you can save the document as an .HFD or .HPD file. Viewing and editing answers in saved form is done in HotDocs Filler. When a form is saved, it is separated from the template file, component file and answer file that created it. This separation means the fields on the document no longer function as HotDocs variables, but simply as text placeholders.

You may also be able to save documents as PDF files. This not only separates the document from the component and answer file, it also removes the placeholder fields. Only the current answers are shown as static text on the document. To work with a PDF document, you must have a full version of Adobe Acrobat installed and use the Acrobat tools for editing documents.

Start HotDocs Filler to locate and open the appropriate form document. When you edit a saved form document, HotDocs Filler still automatically checks the length of the answers and the size of the fields. If your changes cause an answer to fit in its field, Filler removes that item from the addendum; if your changes cause an answer overflow, Filler warns you and asks how you want to resolve the overflow.

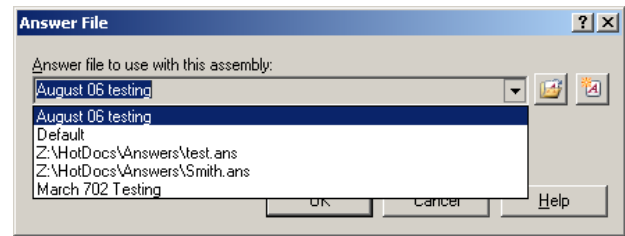
Optionally, you can perform any of the following tasks:

To	Do This
Change an answer in a field	Select the field and type in a new answer.
Create new fields (no variable can be attached)	With the Field Tool, press the left mouse button and move the mouse pointer to draw a rectangle.
Print the document	Click the PRINT button.
Open a different HotDocs form file	Click the OPEN button then locate the desired file.

Using an Existing Answer File

When you open a form template, you can start a New Answer File or open an existing Answer File. When you open an existing Answer File, any fields that you have already supplied the answers for will be automatically completed for you.

- 1) Select the form you wish to complete from the library listing.
- 2) Click the ASSEMBLE button.
- 3) At the Answer File dialog box, click the down arrow to display the available answer file or click the OPEN button to display the default Answers directory.
- 4) Select the Answer File you need to use and click the SELECT button when in the Answer directory.

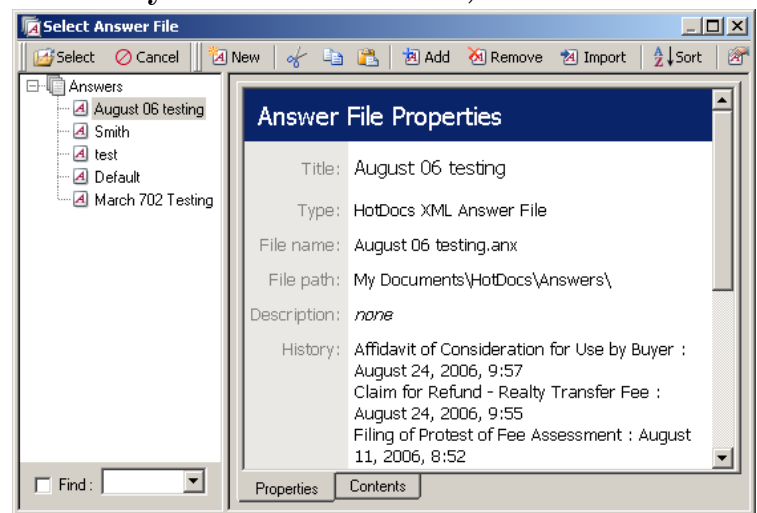


The form will appear on your screen. Any fields previously answered will be populated with the same data. If you make a change to a number field, the totals will recalculate, Wizards and drop down boxes will work, etc.

Using Your Answer File Library

The Select Answer File window helps you organize answer files, much like a HotDocs library helps you organize templates and clause libraries. When you save an answer file, HotDocs adds the file to the answer file manager. The Select Answer File automatically tracks all the answer files you create. You can manage your answers files by modifying the properties that include their file names, titles, locations and descriptions.

In addition, you can view an answer file's history—a list of all the times the answer file has been used, including the template it was used with. Finally, the Select Answer File lets you preview the answers currently saved in an answer file by using the CONTENTS tab.



TIP: Items in the library work like shortcuts to the actual files so you must be cautious when working with the actual files. Moving an actual file without updating the file path will make the file inaccessible from the library.

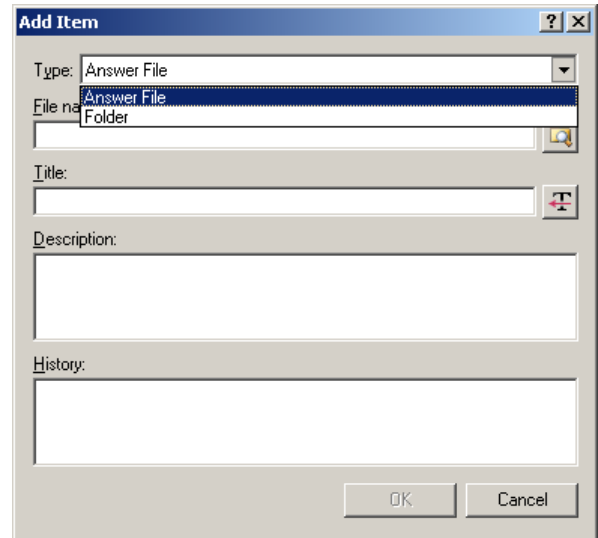
DELETE AN ANSWER FILE FROM THE LIBRARY:

- 1) Select the file then click DELETE or hit the delete key on your keyboard.

You will be asked if you want to delete the associated Answer File. Click YES to delete the Answer File from your list and from the hard drive. Click NO if you just want to remove the Answer File from the list, but not physically from your hard drive.

CREATE A FOLDER:

- 1) At the HotDocs library window, click the **Answer File Manager** button. The Answer File Manager window appears.
- 2) Click the **Add** button. The ADD ITEM dialog box appears.
- 3) In the TYPE drop-down list, select FOLDER. The dialog box changes to show the options needed for folders.
- 4) In the TITLE field, type a name for the folder.
- 5) Optionally, type a description about the folder in the DESCRIPTION box. (This description will appear at the PROPERTIES tab of Answer File Manager.)
- 6) Click OK. The folder is added to the answer library.



ADD AN EXISTING ANSWER FILE:

If a colleague has created an Answer File and you wish to use the same file, you can “add” the file to your Library.

- 1) At the HotDocs library window, click the **Answer File Manager** button. The Answer File Manager window appears.
- 2) Click the **Add** button. The ADD ITEM dialog box appears.
- 3) Next to the FILE NAME box, click the **Browse** button to locate and open the file.
- 4) In the TITLE box, type a name for the answer file. This title will identify the answer file in Answer File Manager.
- 5) Optionally, in the DESCRIPTION box, type a description to help you identify the answer file. (This description appears at the PROPERTIES tab of Answer File Manager and can be used when searching for specific answer files.)

TIP: You can add multiple answer files at one time. When browsing for files, you can press CTRL or SHIFT to select more than one file at a time.

CHANGE AN ANSWER FILE'S TITLE, HISTORY OR NOTES:

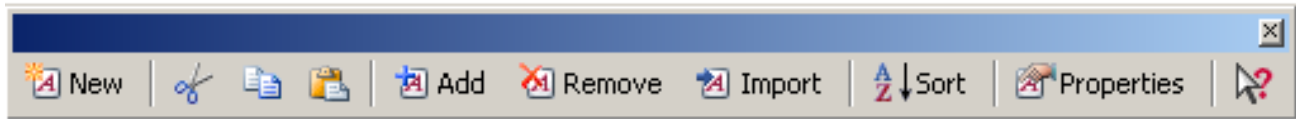
- 1) Select the item you want to change.
- 2) Click PROPERTIES.
- 3) Enter the new title name.

TIP: By adding keywords to the notes, it will be easier to locate the Answer File later by using the Find feature.

Manage Your Answer Files

When you are viewing Answer File Manager, you are not viewing the actual answer files — instead, you are viewing references to actual answer files, similar to shortcuts in Windows. Because of this, use caution moving answer files on your workstation or changing file paths. If the file path does not match the actual file location, you will be unable to access that answer file.

- 1) Click the **Answer File Manager** button. The **Answer File Manager** dialog box appears.
- 2) Complete any of the tasks described in the following table:



To	Do This
Create a new empty answer file	Click the New button.
Delete an answer file	Select the answer file and then click the Remove button.
Sort answers in alphanumeric order	Select a folder and then click the Sort button.
View the answers currently saved in the answer file	Select the answer file and then click the Contents tab.
Find when an answer file was used to assemble documents	Select the answer file and then click the Properties tab.
Change the title, path, file name, history or description	Select the answer file and then click the Properties button and make the changes.
Change a folder's title or description	Select the folder and then click the Properties button. Make the changes.
Delete a folder	Select the folder and then click the Remove button.
Move an answer file to a different folder	Double-click the folder to open it and then select the answer file and drag it to the folder.
Search for a specific answer file	Check the Find box and type in any text from the answer file's title or description.

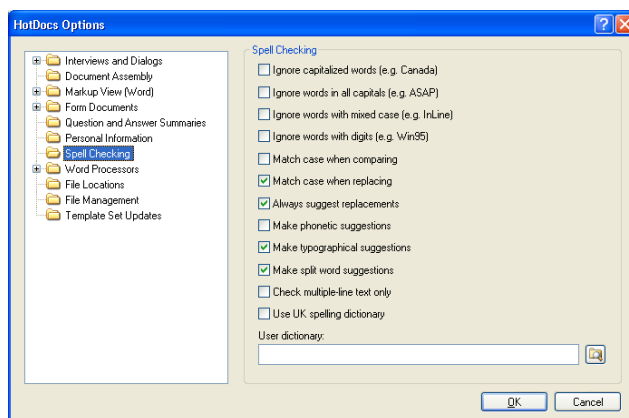
SPECIAL FEATURES

Spell Checking

You can have ASLF spell check your answers as you enter them into the forms or after you complete filling in a form.

TO SPELL CHECK ANSWERS AS YOU TYPE THEM:

- 1) Open ASLF to the Library List Screen.
- 2) Click TOOLS on the Menu.
- 3) Click OPTIONS.
- 4) Select the SPELL CHECKING folder.
- 5) Select the options needed as described in the following table:



To	Do This
Have HotDocs ignore capitalized words, such as names, cities, titles and so on	Select IGNORE CAPITALIZED WORDS.
Have HotDocs ignore words that contain all capital letters, such as acronyms	Select IGNORE WORDS IN ALL CAPITALS.
Have HotDocs ignore words that contain both uppercase and lowercase letters	Select IGNORE WORDS WITH MIXED CASE.
Have HotDocs ignore words that also contain digits	Select IGNORE WORDS WITH DIGITS.
Have the replacement words HotDocs suggests match the case of the misspelled word	Select MATCH CASE WHEN COMPARING.
Have HotDocs match the case of misspelled words when replacing them	Select MATCH CASE WHEN REPLACING.
Have HotDocs provide a list of possible replacements for misspelled words	Select ALWAYS SUGGEST REPLACEMENTS.
Have HotDocs provide a list of possible replacements based on words that sound like the misspelled word	Select MAKE PHONETIC SUGGESTIONS.
Have HotDocs provide a list of possible replacements based on words that are typographically similar	Select MAKE TYPOGRAPHICAL SUGGESTIONS.
Have HotDocs provide a list of possible replacements that are made up of more than one word	Select MAKE SPLIT WORD SUGGESTIONS.
Have HotDocs spell check text fields that have more than one line to them	Select CHECK MULTIPLE-LINE TEXT ONLY.
Have HotDocs use the UK spelling dictionary	Select USE UK SPELLING DICTIONARY

Complete your form as usual. The program will alert you to any misspelled words. You can deselect the item to disable the automatic spell checking.

TIP: Spell check is part of the programming within each form. Spell check will not work on saved Filled Forms.

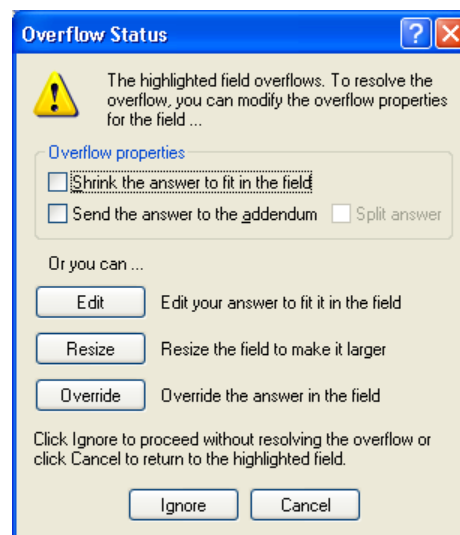
Field Overflow

When you fill a form, ASLF checks each field as you move to the next field and verifies that the information you entered will fit in the space allowed. If the text does not fit, ASLF will make you aware of the overflow by displaying an Overflow Options dialog box.

After you answer the variables in dialogs, you can manually check for answer overflow. And when you direct-fill assemble a form document, HotDocs automatically checks each field when you move to another field. Also, when you print a document, HotDocs checks for any unresolved answer overflows.

MANUALLY CHECK FOR FIELD OVERFLOW:

- 1) At the HotDocs library window, select a form template and begin assembling the document.
- 2) After answering the questions in each dialog, select the DOCUMENT tab to view the assembled document.
- 3) Click CHECK OVERFLOW (TOOLS menu). HotDocs begins comparing the size of each field and answer.
- 4) If an answer is too long, the OVERFLOW OPTIONS dialog box appears.



Make adjustments as explained in the following table:

To	Do This
Edit the answer to make it fit the field	Click EDIT then change the answer.
Resize the field to make it fit the answer	Click RESIZE then change the size of the field.
Override the field type and edit the answer	Click OVERRIDE.
Shrink the font size until the answer fits or the minimum font size is reached	Select SHRINK TO MINIMUM SIZE. If new size still isn't adequate, you must select a different option for resolving the overflow.
Send the entire answer to the addendum	Select SEND TO ADDENDUM.
Resolve the overflow later	Click IGNORE.

After resolving an overflowing field, the IGNORE button changes to the CONTINUE button. Click CONTINUE. HotDocs checks again to see if the answer fits, then moves to the next field with answer overflow, if any.

TIP: You can prevent HotDocs from checking overflows during assembly through the TOOLS menu.

Resize Fields

During direct-fill assembly, HotDocs may notify you that an answer overflows its field. One way to resolve answer overflow is to enlarge the size of the field so it can contain the entire answer.

- 1) At the OVERFLOW OPTIONS dialog box, click **Resize**. The assembly window shows the overflowing field with handles on the borders.
- 2) Position the mouse pointer over one of the border handles. The pointer changes to a double-pointed arrow indicating which directions the border can move.
- 3) Hold down the mouse button and drag the border to a new position.
- 4) When you think the new size is big enough to contain the entire answer, click **Resume** on the OVERFLOW OPTIONS dialog box. HotDocs checks the field again.
- 5) If the overflow is not resolved, the OVERFLOW OPTIONS dialog box prompts you again to resolve the overflow.
- 6) If the overflow is resolved, the OVERFLOW OPTIONS dialog box affirms there is no overflow. Click **Close**.

Overriding a Field

At times, the settings for a field may not work for the information required. You can override the programming in a field. For example, if a field is programmed as a date field and you need to type words into that field, you can override the programming and type the text in the date field. If you want to keep an answer from flowing between like variable fields, you can override. When you override, you can type any character in the field regardless of the type of information the field is programmed to receive.

Note: The Override command is not available in a saved Filled Form. Answers typed in overridden fields are not saved in the answer file. The original answer is saved in the answer file and used in any computations or other fields that require it.

WHEN YOU OVERRIDE AN ANSWER

- You override it in that field only. If other variables have the same name, they will not be affected by the override.
- No information entered into a field override is included in any calculations or saved to the Answer File.
- The answer previously typed into that field will be saved to the Answer File and will not be used in calculations involving that field.

TO OVERRIDE AN ANSWER:

- 1) After entering answers, click the FORM DOCUMENT tab. The assembly window changes to show the document.
- 2) Select the field you want to override.
- 3) Click the OVERRIDE FIELD button and, at the OVERRIDE FIELD warning message, click OK. The assembly window appears again.
- 4) In the field, type the answer you want and then move to a different field. The overridden field changes to gray.

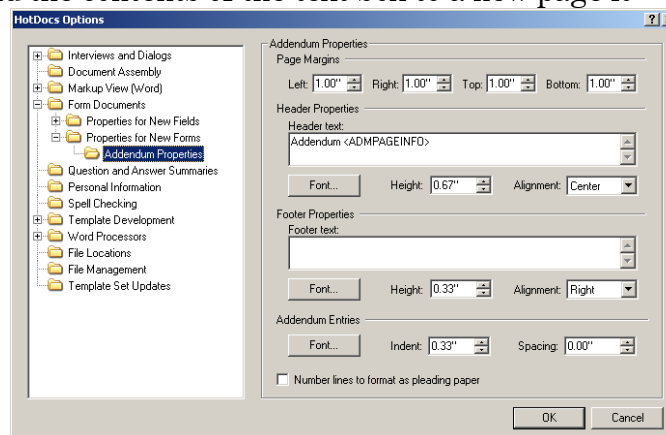
To remove the overridden answer, select the field and click the OVERRIDE FIELD button. The current answer is removed and the saved answer reappears. In a saved form document, you cannot “override” an answer. Instead, you simply select the field and edit the answer as necessary. Please note that the override warning will then appear when you try to print or save the form.

Addendum

One of the options to correct an overflow is to send the answer to an addendum. By selecting the SEND TO ADDENDUM option, ASLF will send the contents of the text box to a new page it creates at the end of the document. You can also use this option to force an addendum.

Click the FIELD menu choice and select Overflow from the menu to see the Field Overflow dialog box.

Your addendum will appear at the end of the form on a new page unless you specify otherwise. You can format your addendum under the menu choice of FORM, ADDENDUM. You can create headers and footers, change page margins, fonts and more.



Change the Addendum Format

The default addendum appearance may not be consistent with your project standards. You can change the addendum items and references, as well as the fonts, spacing, headers, footers, page numbering and page formatting. You can also choose to print the addendum as a pleading paper.

- 1) Open a template for editing.
- 2) Click TEMPLATE PROPERTIES then ADDENDUM (FILE menu). The ADDENDUM dialog box appears.

Make changes as described in the following table:

To	Do This
Include header or footer text in the addendum	Type the desired text in the HEADER or FOOTER field. (Click FONT to change the formatting of the header or footer text.)
Control the alignment of the header or footer text	Select one of the alignment option buttons below the HEADER or FOOTER field.
Insert a variable in a header or footer	Click the VARIABLE button below the HEADER or FOOTER field. The VARIABLE TYPE dialog box appears. Create or insert the variable as usual.
Specify the addendum page margins	Specify the margin settings in the PAGE MARGINS grouping. You can change the left, top, right and bottom margins.
Control the distance between labels and answers	Change the setting in the INDENTATION answer field.

You cannot edit the contents of an addendum while it is still in HotDocs. To change answers in an addendum, you must either modify your answers at the DOCUMENT tab or you must send the addendum to the Windows Clipboard (FILE menu then SEND ADDENDUM TO then CLIPBOARD), so you can paste the text into a word processing application.

Helpful Hints

This area includes information to make using ASLF easier for you.

Accessing Functions within ASLF

There are three ways to access the functions available in ASLF.

- The menu bar
- The icons
- Right-click menu.

Field Types

There are seven basic types of fields programmed in each of the boxes displayed on a form. They are:

Field Name	Field Function
Text	The text fields will accept any character. Some text fields are preprogrammed with a pattern, such as Social Security Numbers and Phone Numbers so that you only need to type in the numbers, the dashes and other symbols are entered for you as you type.
Date	The date fields can be filled by selecting from the calendar wizard or by typing in a date. Date fields may also be programmed with a predetermined pattern to write out the date or another date format. If you want to place today's date in the date field, type the letter T and hit the tab key. The current system date will be filled in.
Number	Number fields may be programmed to add the currency symbol and add thousand separators, based on the use of the field in the form. To make a number negative, type a minus sign (-) after you type the number and before you hit the tab key to move to your next field.
True/False	True/False fields are used for some check boxes where only one box may be selected. True/False fields are also used in forms that call for you to make a choice such as, "is" or "is not." If you click the variable, the area will display XXX.
Multiple Choice	The forms include drop-down lists where applicable. For example, in many of the forms you can click on a drop-down list of locality names in New Jersey. If you select the name, the county will also be filled in for you. If you see an arrow at the right edge of the text box, click on it to have the multiple-choice list appear.
Computation	When a form has fields that need to be totaled or calculated, they have been set up with programmed formulas. When this type of field is selected it is gray. If you move into a computation field, a formula will recalculate. Another way to get a total to recalculate after you have changed numbers is to hit the Esc key. By default, you cannot type in a computation field unless you override it.
Controlled	If a field is green, you do not have the ability to type in it. These are fields programmed to accept information from another source and will be filled in if the criteria has been met.

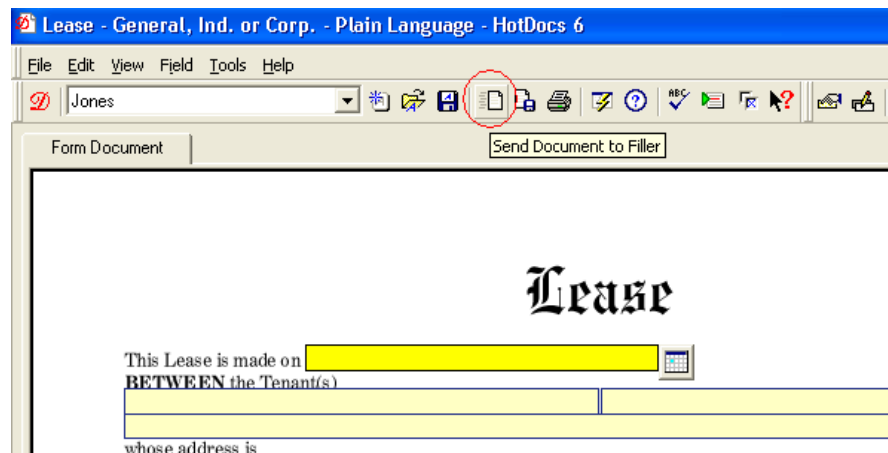
Properties

You have the ability to change the properties of fields, such as **text alignment** or the **font** used. Right-click on a field and select **PROPERTIES** from the menu to access these tools.

Adding Text to a Form

Instead of using a typewriter to add X's or additional text to a form, you can add/create a field in an assembled form document using the Filler portion of the program. This field can contain information; however, this information will not be saved in the answer file or be used to calculate other answers in the assembled document.

- 1) Select the form you would like to customize and click the **ASSEMBLE** button or double click on the form.
- 2) Select the Answer file you would like to use and click **OK**.
- 3) In the assembly window click the **Send Document To Filler** button. HotDocs Filler will open. It will look just like the Assembly screen.
- 4) Click the **Select Fields** (the arrow) button.
- 5) Double click in the area on the form where you want to add the box.
- 6) Click on any of the “red handles” to move or resize the box.
- 7) Click on the box and it will turn yellow.
- 8) Type in your text.



Change Size of Fields

You may need to adjust the size of a field to fit it into the available space on the form document.

- 1) Either at the **Form Document** tab of the assembly window or at the open form in HotDocs Filler, click on the box you want to resize.
- 2) Click on a red handle or field border at each corner and in the middle of each side of the box.
(When the mouse pointer is on a handle, the pointer changes to a double-arrow indicating the directions the border can be moved.)
- 3) Hold down the mouse button.
- 4) Drag the border to a new position.



TO MOVE A TEXT BOX:

- 1) Hold down the **CTRL** key, your mouse arrow will have a symbol that looks like a text box.
- 2) Click on the text box so that the red handles are visible.
- 3) Place your mouse over the edge of the box until you see a four-headed arrow.
- 4) Hold down the mouse button and drag the box to its new location.

Customize the way answers are displayed.

When a form document is assembled, each field will contain an answer (unless a field is skipped intentionally). HotDocs provides you with many options for displaying answers in fields, such as controlling the position, orientation, font, margins, indentation, line formatting and minimum font size for a field.

- 1) Either at the **Form Document** tab of the assembly window or at the open form in HotDocs Filler, select a field.
- 2) Click the **Properties** button. The **Properties** dialog box appears. (You can also right-click and select **Properties** from the shortcut menu.)
- 3) Make changes as described in the following table:

To	Do This
Change the text's horizontal position in the field (according to text rotation settings)	Select Left , Center , Right or Justified in the Text group. (Justified aligns the text both right and left when the text wraps to another line.)
Change the text's vertical position in the field (according to text rotation settings)	Select Top , Center , Bottom or Justified in the Text group. (Justified spreads two or more lines of text evenly between the top and bottom of the field.)
Rotate the text	Select 0° , 90° , 180° or 270° in the Text group.
Change the font and font properties assigned to the field	Click Font . The Font dialog box appears, where you can change font properties.
Specify a minimum font size for the field	Type a number in the Min Size field or use the arrows to select a number. When trying to resolve overflow, HotDocs won't reduce the font size smaller than this number. (If an answer is longer than the space available in the field, you can specify that the font size should be reduced. After shrinking the font size to this minimum font size, if the answer is still too long, other methods must be used to resolve the answer overflow.)
Change the amount of space between the text and the field borders, relative to the text rotation	Specify new numbers in the Margins group.
Save changes to the current field and make changes for the first, previous, next or last field	Click the corresponding arrow buttons. On the form, the appropriate field is made active and the Properties dialog settings change to describe the new field.
Change the unit of measurement (inches, points or centimeters)	Select a measurement option. Margins and first line indent are displayed in the selected unit of measurement: inches, points or centimeters.
Indent the first line of text in an edit field	Click the up arrow or type a number in the First Line Indent box.
Create a hanging indent (A hanging indent formats the answer so the first line extends farther to the left than subsequent lines of text.)	Click the up arrow in the Left Margin that specifies where you want the left margin to start and then click the down arrow to select a negative number for the First Line Indent box.
Set the same preferences for multiple fields	Select all the fields you want to change, then open the Properties dialog box and make the changes.

Backing Up Answer Files

An important part of your work is the answer files; the files that contain all the client information you've input into forms. To avoid losing your answer files, it is recommended that you back them up on a regular basis. We also recommend that you back them up prior to installing any software updates, as a precaution. You can copy the answer files to a separate folder on your hard drive, a diskette or zip disk.

Locating the Answer Files

The Answer files can be stored in various places depending on:

- Where you instructed ASLF to install your answer files.
- If you use Microsoft Word.
- If you use WordPerfect.

If you do not know the location of your answer files, you can use Windows Find or Search tools to find the files. Depending on which version of Microsoft Windows you are using, when you click on your Start button, you will see the choice of Find or Search on the menu. ASLF answer files always end with the file extension .ANS, therefore specify *.ANS when starting your search.

Character Mapping

You can use Character Map to view the characters that are available in a selected font. You can search for characters by Unicode character name or Unicode subgroup (such as arrows or mathematical operators) or by other special classifications.

If you know the Unicode equivalent of the character you want to insert, you can also insert a special character directly into a document without using Character Map. To do so, open the document and position the insertion point where you want the special character to appear. Then, with NUM LOCK on, hold down the ALT key while using the number pad keys to type the Unicode character value.

If you want to put the Degree Symbol (°) in while typing, hold down the ALT key while using the number pad keys to type 0176. The Degree Symbol will now be in the text.

More Helpful Hints

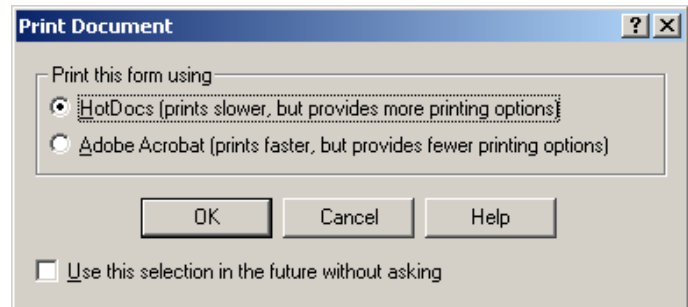
- When choosing a county or locality from a **drop down list**, type the first letter of the county or locality needed to quickly move to the first item alphabetically in the list that starts with that letter.
- You can use the spacebar to put an "X" in a check box.
- To see how your form will look when it is printed (similar to **Print Preview**), click on the **Fields Button** to hide the blue text boxes.
- **Help** is always available by clicking Help on the Menu Bar or by pressing F1.
- To **Zoom in**, press F10. To **Zoom out**, press F9.
- To create a **negative number** in a number field, type the number first and then the minus sign.

Printing Forms

Print a Completed Document

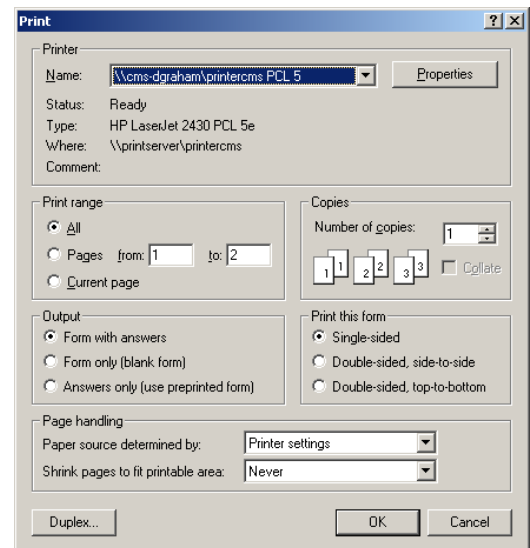
Many projects require you to print copies of your completed documents.

- 1) At the assembly window, click the **Document Preview** tab (for form templates, the **Form Document** tab). The assembly window shows a preview of the document.
- 2) Click the **Print Document** button on the toolbar. The document is sent to the specified printer.



TO PRINT A FILLED FORM:

- 1) Select FILE from the menu.
- 2) Select PRINT DOCUMENT.
- 3) Select ADOBE ACROBAT and then click OK. Adobe Acrobat will open and then the Print dialog box will open.
- 4) Click the PROPERTIES button if the page size is legal size. Change the page size for the printer to be legal. Then after checking the other options desired, click OK.
- 5) When printing is complete, close the Adobe Acrobat window.



Print a Blank Copy of a Form

Situations can arise where the person best suited to answer the questions on a form may not have access to a computer or may not have HotDocs installed. For such cases, a printed copy of the form is one of the best ways to gather the information needed. You can print a blank copy of a form from the assembly window.

To print a blank copy of a PDF-based template (.HPT), you must use HotDocs' native printing functionality, which gives you the option of printing only the form. (This option is not available with Adobe Acrobat.) You specify this functionality at the PRINT DOCUMENT dialog box, which appears when you click the PRINT DOCUMENT button. If you select to automatically use Acrobat for printing, you must change this setting.

- 1) After assembling the document, Click the DOCUMENT tab. The assembly window changes to show the form document.
- 2) Click PRINT DOCUMENT. A prompt appears, telling you if there are unanswered questions on the form.
- 3) Click OK. The PRINT dialog box appears.
- 4) In the OUTPUT grouping, select FORM ONLY (BLANK FORM) and click OK.

If the DUPLEX PRINT OPTIONS dialog appears, it's because the print options are set to print the form double-sided and HotDocs has not yet printed a double-sided form to the current printer. Answer the questions and click OK.

Some forms are different sizes and require settings different from the default printer settings.

TIP: Printing when form overflows: When users print an assembled PDF-based form document and the document contains unresolved answer overflow, HotDocs gives users three options for resolving the overflow: 1) review and change the answers or field properties, 2) send all overflowing answers to the addendum or 3) truncate the answer.

Print PDF-based Form Documents

When you print a PDF-based form document, HotDocs asks if you want to use either the HotDocs print function or Adobe Acrobat. The following provides some guidelines for choosing an option:

Using the HotDocs Print Function to Print

- You cannot print a PDF-based form using a PostScript printer driver.
- You should print within the 300 dpi to 600 dpi range, as printing at higher resolutions may be problematic.
- For the most reliable results, you should print using a PCL-based printer with at least 8 MB RAM. Other printers may cause unknown problems.
- In HotDocs 6.1 SP1 and earlier, the print function does not scale content to fit within the printable area of the printer—it prints at actual size only. In HotDocs 6.2 and later, you have options for scaling the content.
- You can print the document with or without answers. (You cannot do this using Adobe Acrobat.)
- Printing time takes longer than printing with Adobe Acrobat.

Using Adobe Acrobat to Print

- You can print a PDF-based form using a PostScript printer driver. (PostScript printer drivers are always recommended. Non-PostScript printer drivers may print the page off-center by 1/8" to 1/4".)
- Documents will print with both form fields and answers—you have no option of printing one or the other.
- Printing time is faster than with the HotDocs print function.

PRINT MORE PROFESSIONAL-LOOKING FORMS

By using ASLF, you already know the value of producing crisp, clean forms. ALL-STATE LEGAL also offers a wide selection of ruled and blank papers that will increase the quality of your forms. Not to mention the added security of date stamped watermark paper. Call your Customer Care Representative at 800.222.0510 or log onto www.aslegal.com for more information.

List of HotDocs File Extensions

The following is a list of all file types used by HotDocs:

Extension	Type of File
.RTF	Word RTF Template
.DOT	Word Template
.WPT	WordPerfect Template
.HFT	HotDocs Envoy-based Form Template
.HPT	HotDocs PDF-based Form Template
.HFD	HotDocs Envoy-based Form Document
.HPD	HotDocs PDF-based Form Document
.CMP	HotDocs Component File
.CMP	HotDocs Interview Template
.HDL	HotDocs Template Library
.HDL	HotDocs Clause Library
.HCL	HotDocs Clause Archive
.HDA	HotDocs Auto-Assemble File
.HDI	HotDocs Auto-Install File
.HDP	HotDocs Publish Settings File
.HAL	HotDocs Answer Library
.ANS	HotDocs Answer File
.ANX	HotDocs XML Answer File
.ANT	HotDocs Text Answer File
.HPL	HotDocs Answer Source (Note: This file extension isn't required, but since answer source files and regular answer files are stored in the same folder, many template developers choose this extension to distinguish between answer source files and regular answer files.)
.JS and .HVC	JavaScript interview file and HotDocs Variable Collection file (These files are used when generating HotDocs Online interview.)

Troubleshooting and Frequently Asked Questions

When I open a saved form, like the HUD-1 form (#1401) and make changes to the numbers, it doesn't recalculate. What's wrong with this?

*When you save a Filled Form, you are creating an electronic image or "hard copy" of the form and the form is no longer considered a "live" form. Therefore, automatic calculations no longer work. To work with a "live" form (where you can edit the form and save the changes to the Answer File), you need to open a blank form again and open the Answer File used to create the original "live form." You will then be able to make changes. Just hit the Tab key throughout the remainder of the document after all changes are made or press the **ESC Key**. All fields will be recalculated or updated with the new information. There is no programming attached to a Filled Form, any changes made to the Filled Form will NOT be saved to the Answer File.*

Does the HUD (RESPA) perform tax calculations?

Simple multiplication, addition and subtraction calculations are performed. The tax calculation tables are not part of the ASLF software package.

Can I only buy one practice area of the forms on CD? I only practice Real Estate and only want those forms.

No. ASLF was packaged to include all of our practice specific forms on one CD for convenience in use and in pricing.

Will the ASLF run on a Macintosh computer?

No. HotDocs facilitates the most recent Microsoft Windows programming which is a different platform than that of Macintosh technology.

Is there ability to "password protect" or "secure" documents? How about issuing certain rights, i.e., copy only, view only, etc.?

There are many different ways to secure your documents. Windows allows for password access to your shared folders on your computer. Again, it is best to speak with your system administrator about what is available to you. There is no utility within HotDocs for those functions.

Can I change the pre-printed legal form template?

No, these forms are copyrighted. You can add a field over existing text and fill the new field with an "X" or similar characters to cross out existing text. You can also add text by creating a text box. However, a previous version introduced over 50 word processing templates that are created and automated in a word processing program. After you assemble a document using a text template, you can view the document in your word processor and edit any section of text.

Can I import the legal form into my word processor to edit it?

No, only the word processing templates can be created and automated in a word processing program. After you assemble a document using a text template, you can view the document in your word processor and edit any section of text.

What are your hours for technical support?

Technical Support hours for ALL-STATE LEGAL are 9:00 a.m. – 4:00 p.m., Monday through Friday. LexisNexis support hours are 24/7. Both companies also offer website support.

Do you offer training?

Our technical support staff is available by phone during normal support hours to answer your questions. The CD includes a short 10-minute tutorial, HotDocs Player includes an online help system and this manual may prove helpful. To watch the tutorial, insert the CD in your CD-ROM drive and choose Tutorial from the menu. To access the HotDocs help system, click the Help Menu or press F1.

Do I need to register?

No, you are automatically registered when you purchase ASLF. As such, you are eligible to receive all updates and technical support that occurs within your eligibility period.

How will I be informed of any updates?

When you purchase your software, you will have the option of being informed via fax or email. Full version updates will be shipped to you automatically if they occur during your eligibility period. All other updates will be made available either from our website (the fastest way to receive your updates) or email. An announcement is sent to all ASLF customers when updates are available. Please note that it is important that you notify us when you have changed your telephone, fax or email address. By doing so, we will be able to notify you of any available updates. In order for you to be able to download updates from our website, you need to have internet access to visit us at www.aslegal.com.

How often will ASLF be updated?

Since legal forms change frequently, ASLF is updated at least two times a year. Our carefully selected team of practicing New Jersey attorneys constantly update current forms affected by Court Rule changes and advise us as to any new forms that should be added. Also, the feedback we receive from our customers is reviewed to make further improvements to the software.

What happens when my eligibility period runs out? Will I need to purchase the entire software package again so that I can continue to get updates and technical support?

We will bill you before the expiration date of your eligibility period with information on our Annual Subscription Service. This annual service will allow you to get all form updates and technical support that occur during the time you are a member. These updates are available through our website at www.aslegal.com or you can request to receive them through email.

What if I choose not to participate in the Annual Subscription Service and then change my mind later?

You will not be able to subscribe to the annual service after your initial expiration date has passed. Any requests thereafter for updates will require you to purchase ASLF at the current per user price.

I purchased a single user license and would like to use the software on an additional computer(s). What do I need to do?

Simply notify us that you would like to upgrade your user license to add additional users. Your account will be charged accordingly.

Which icon do I click on to start using the software?

ASLF adds two sets of icons to your Windows menus. The best icon to use is accessed by your Start Button and then selecting the following:

Programs; ASLF Legal Forms; Forms on HotDocs; ALL-STATE LEGAL Forms

This will open ASLF and launch the HotDocs program. The first thing you will see is the library listing, where you can select the form needed and begin using the program.

I saved a filled form and want to open it to edit it. I don't need to edit the answer file in this instance. How do I open a filled form?

You can open filled forms from the HotDocs filler screen. To open that program make the following menu selections after you click the Start button:

Programs; HotDocs 6; HotDocs Filler 6

On the HotDocs Filler menu, select FILE, OPEN to open a filled form.

How do I put an icon right on my desktop?

*When using Windows 2000 SP4 or later, click the menu choices until you arrive at the icon you want to send to your desktop. Right-click the icon to see a menu. Choose Send to ►, Desktop (**Create Shortcut**) and an icon will appear on your desktop.*

When I called for support I was asked which form number I was calling about. What is a form number?

*With only a few exceptions on Appendix forms, in the bottom left-hand corner of each page of every form is a footer with the form number followed by a form description, the “**R**” **Revised date** (the date the form was last revised) and the “**P**” **Printed date** (the date ALL-STATE LEGAL last printed the form to sell. Not all forms are printed, some only appear on the software.) The form numbers are ALL-STATE LEGAL assigned numbers unique to each form. There are over 350 ASLF forms. If you have the form number ready when you call, it helps technical support find the form in question because it is unique to the form.*

How can I tell by looking at the form when it was last revised?

*With only a few exceptions on Appendix forms, in the bottom left-hand corner of each page of every form is a footer with the form number followed by a form description, the “**R**” **Revised date** and the “**P**” **Printed date**. For example, if the footer reads R 6/01, the form was last revised in June of 2001.*

Subscription Information

After the first year of purchase, your firm can continue receiving the most up-to-date, trusted and dependable forms in the State of New Jersey right at your desktop with the following benefits:

- Continuous updates of ASLF that occur during your membership period. These updates include new forms, enhanced features, as well as modifications to forms affected by court rule changes.
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You may choose to pay in full within thirty (30) days of receipt of your invoice and receive 5% off the regular annual subscription rate; or there is a Deferred Payment Option that will allow you to pay the regular annual subscription rate in 12 monthly installments. The latter option is not available for all accounts and requires a signed "Deferred Billing Agreement." If you choose the Deferred Payment method, please be sure to tell us how you would like to receive the Agreement (either via fax or email). Once completed, please forward the Agreement to the attention of our Technical Support Department.

For an additional 10% savings off the subscription price you can choose the Two Year Renewal option listed below.

You will have thirty (30) days from the date of expiration to enroll in the Annual Subscription Service. All requests for membership or updates after that time will require you to purchase ASLF at the current per user rate and all Technical Support calls will be charged \$30.00 per call.

You may cancel your membership at anytime within thirty (30) days from the initial date of membership. No credit will be given for any attempted termination of service after thirty (30) days.

PRICING INFORMATION*

ONE YEAR

Workstation	1-2	3-5	6-10	11-20	21-40	41-60	61-99	100-199
Reg. Price	\$303.00	\$432.00	\$508.00	\$687.00	\$814.00	\$942.00	\$1,120.00	\$1,324.00
Net 30	\$287.85	\$410.40	\$482.60	\$652.65	\$773.30	\$894.90	\$1,064.00	\$1,257.80
Deferred	\$25.25	\$36.00	\$42.33	\$57.25	\$67.83	\$78.50	\$93.33	\$110.33

* Prices subject to change without notice

TWO YEAR

Workstation	1-2	3-5	6-10	11-20	21-40	41-60	61-99	100-199
Reg. Price	\$545.40	\$777.60	\$914.40	\$1,236.60	\$1,465.20	\$1,695.60	\$2,016.00	\$2,383.20
Net 30	\$518.13	\$738.72	\$868.68	\$1,174.77	\$1,391.94	\$1,610.82	\$1,915.20	\$2,264.04
Deferred	\$45.45	\$64.80	\$76.20	\$103.05	\$122.10	\$141.30	\$168.00	\$198.60

Glossary of Terms

Addendum - pages added to a form document to show answers that do not fit in the fields.

Answer File - a file that contains the information used to assemble a document. This client or case specific information can be used to reproduce the same information where the fields are common from form to form. Other forms may need information that was not previously saved into an Answer File. The new information will be added to the existing Answer File when you choose to save it after you complete the form.

Answer File Manager - the tool used in HotDocs 6 to organize and access answer files.

Answer Summary - an outline showing the dialogs, questions and answers used to assemble a document.

Answer Wizard - a special button that appears next to an answer field in a form document. Clicking this button displays questions that will help you answer the question.

Assembly - the process of completing an interview; providing information for a HotDocs template in order to generate a document.

Automated Form - a HotDocs template containing variables.

Dialog - a collection of related questions used to simplify the assembly process.

Document Template - the actual legal form itself. This form appears as an image and cannot be imported into a word processor or modified.

Field - a area on a form template prepared to hold answers.

Fill - the action taken by the program to supply a Graphical Form with the information you have provided.

Forms Set - a collection of HotDocs templates.

Forms Document - a document that contains all the answers required to be completed. A form document's underlying text is static, meaning it cannot be altered or changed.

Forms Template - a file that contains special fields (or variables) where answers will be merged to produce a completed document. A form template's underlying text is static, meaning it cannot be altered or changed.

History - a record of when an answer file has been used and what templates it was used with.

HotDocs Filler - an application that lets you use direct-fill assembly for HotDocs form templates; you can also use Filler to edit completed form documents.

HotDocs PDF Advantage - an application that allows you to save assembled text and form documents as PDF files.

HotDocs Player - an application that lets you assemble HotDocs templates.

Interview- a series of grouped questions you must answer in order to produce a completed document.

Overflow - if an answer will not fit in the Field provided on the Form, you will be warned that the answer Overflows. You can then choose to edit the answer, resize the Field, override the Overflow, shrink the font until the answer fits or reaches the minimum size or send the answer to an addendum.

Pick List - a list of information that can supply answers to questions. You can choose from a Pick List when the Select button appears on a Dialog. The pick list information is available to all Answer Files.

Question Summary - an outline showing the dialogs and questions in a template that need to be answered to complete a document.

Repeated Dialog - when a form will request identical information for an unknown number of individuals (such as a client's children), the Dialog will be set to Repeat until you have entered as many individuals as you need. To continue the **Interview**, select Next at an empty Dialog or click Finish and select the option for finishing the current repeating dialog.

Template - a HotDocs file where instances of variable text have been replaced with HotDocs variables.

Text Document - a document that contains all the answers required to be completed. A text document is viewed using a word processing program.

Text Template - a file that contains special fields (or variables) where answers will be merged to produce a completed document. A text template is created and edited using a word processing program

Variable— a special field in a HotDocs template where information that changes is merged.

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8	Acknowledgment Individual Deeds Only	225	Extension of Mortgage Ind. or Corp.
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1634	Certification of Purchaser	2320	Notice of Unpaid Balance and Right to File Lien
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105	Deed - Executor or Administrator Cov. as to Grantor's Acts	1631	Supplemental Affidavit
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Workers' Compensation

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WC-381	Medical Provider Application for Payment	WC4-65s	Second Injury Fund - Verified Petition
441CM	New Case Memo	WC27	Subpoena - Workers' Compensation
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WC4-11	Notice of Motion for Temporary Disability and Medical Benefits	WC4-100	Workers' Compensation Substitution of Attorney
WC4-37s	Order Approving Settlement with Dismissal		

Wish List

What is a Wish List?

In order to provide you with the highest-quality software package possible, ALL-STATE LEGAL relies on the feedback, comments and suggestions of our customers regarding ways in which we can enhance ASLF.

If you have feedback that you would like to offer, please fill out the form below. All information received is reviewed promptly. ALL-STATE LEGAL may contact you to provide more details regarding your suggestion. Please make sure that your contact information is accurate.

Please type or print clearly.

1. What features would you like to see added to our program?
2. What forms do you feel should be added to the software? Please include examples.
3. What clauses/options would you like to see in certain forms?
4. Are there other types of correspondence or reports that you would like to see included in the software? (I.E., transmittal letters, filing letters, expense reports, time sheets, etc.)

5. Other comments and suggestions:

In the event that we need to contact you regarding your suggestion(s), please make sure the following information is accurate:

Firm Name:	
No. of Attorneys:	
Your Name:	
Title:	
Address:	
Phone:	
Fax:	
Email:	

Either fax or mail the completed form to:

ALL-STATE LEGAL
Attn: Software Product Manager
One Commerce Drive
Cranford, NJ 07016
Fax: 908.956.6509

QUESTIONS?

Please call us at 908.272.0800 ext. 6432 (Outside of NJ 800.222.0510)
or email us at techsupport@aslegal.com.

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This image shows a single page of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There is no handwriting or other markings on the paper.